



Deer Oaks EAP Services – Mandatory Referral Process

- 1) Supervisor contacts HR to discuss the employee issues and mutually decide that a mandatory EAP referral is appropriate.
- 2) HR typically completes sections 1, 2, and 3 as well as the employee/HR contact information at the bottom of the *Authorization to Release/Receive Information* form. HR discusses with the supervisor the information that will be released.
- 3) HR provides the release of information form to the supervisor along with a copy of this mandatory referral process.
- 4) Supervisor meets with the employee to advise of the referral and/or explain the process, including the type of information that will be reported to the HR. Up to five counseling sessions are allowed. The employee reviews and signs the *Authorization to Release/Receive Information* form. If the employee refuses to sign the release form, the referral will not be processed by EAP.
- 5) Supervisor submits completed *Authorization to Release/Receive Information* form to HR.
- 6) HR contacts EAP Work-Life Specialist at 866-792-3616 and requests a mandatory referral.
- 7) Work-Life Specialist will connect HR to clinical case manager. HR will brief the clinical case manager on the primary reasons for the referral.
- 8) The Clinical Case Manager will take note of the mandatory referral information and ask HR to send a copy of the *Authorization to Release/Receive Information* form. The form may be faxed to 866-240-3933 or emailed to WPOManagerConsult@workplaceoptions.com.
- 9) The Clinical Case Manager will review the case management steps with the HR, which include:
 - a) Employee is to call clinical case manager at 1-866-792-3616 to set up the initial appointment within 2 business days after the meeting between the supervisor and the employee (day of meeting isn't counted). Employees attending EAP sessions at the agency's direction may attend during work time (see also §15/12 of the bargaining agreement and Ch. 9, §12.04 of the Personnel Rules).
 - b) If employee does not call within 2 business days after the meeting between the supervisor and employee, HR will be notified.
 - c) If employee does call, the referral/appointment is made.
 - d) Clinical Case Manager will contact HR via email or phone to inform of the date of the first appointment.
 - e) A summary of progress is reported to HR after the first and final sessions.